

**FRESNO, CALIFORNIA**  
**CLASS SPECIFICATION**  
**RETIREMENT SPECIALIST**

**FLSA STATUS:**

Exempt

**CLASS SUMMARY:**

The Retirement Counselor is the second level in a two level Retirement Counselor series. Incumbents perform journey level retirement counseling, exercise independent and significant judgment, related to benefits and options, disability retirement, and retiree payroll. Incumbents deal with highly complex and confidential issues, and apply and interpret the provisions of the Fresno Municipal Code and Memoranda of Understanding, and Federal and State pension tax laws.

The Retirement Specialist is distinguished from the Retirement Counselor by its responsibility for performing journey level retirement counseling services to employees.

**TYPICAL CLASS ESSENTIAL DUTIES:** (These duties are a representative sample; position assignments may vary.)

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QUENCY**

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| 1. | Verifies benefit eligibility and prepares estimates of benefits payable; counsel's members and their beneficiaries on benefit options, service purchases, service and disability retirement, Deferred Retirement Option Program (DROP), Post Retirement Supplemental Benefit (PRSB) program, and death benefits. | Daily<br>50%    |
| 2. | Responds to a variety of retirement benefit questions, ranging from routine to complex, for active, deferred, and retired members, explaining various options so members can make informed retirement planning choices.  | Daily<br>20%    |
| 3. | Receives, processes, and prepares a variety of forms, documents, and related information related to retirees.  | Daily<br>10%    |
| 4. | Prepares and maintains retiree records regarding benefits, insurance, and deductions.  | Daily<br>5%     |
| 5. | Prepares presentations and speaks before groups of members to explain benefits.  | Bi-Weekly<br>5% |
| 6. | Researches and compiles data and information associated with retiree benefits and prepares related reports detailing findings and recommendations.   | Monthly<br>10%  |
| 7. | Performs other duties of a similar nature or level.  | As<br>Required  |

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**POSITION SPECIFIC RESPONSIBILITIES MIGHT INCLUDE:**

Depending on assignment, positions may be responsible for:

- Gathering, organizing and processing disability applications
- Administering domestic relations orders and providing related counseling
- Implementing system and program changes due to legal rulings, IRS guidelines, changes to the Municipal code, Memorandums of Understanding (MOU), and legal settlements
- Setting up, maintaining, and adjusting DROP accounts
- Processing retiree payroll, including refunds
- Implementing changes to retirees' tax and insurance deductions
- Setting up and maintaining retirees' and surviving spouses' monthly benefits
- Processing insurance letters for retirees and/or their spouses upon reaching age 65

**Training and Experience** (positions in this class typically require)

- Fifteen semester units of accredited college level course work in Business Administration, Public Administration, or a related field and one year of experience as a City of Fresno Retirement Counselor or equivalent;

OR

- An equivalent combination of education and experience sufficient to successfully perform the essential duties of the job such as those listed above.

**Licensing Requirements** (positions in this class typically require):

Some positions, based on assignment, may require:

- Basic Class C license.

**Knowledge** (position requirements at entry):

Knowledge of:

- Pension administration systems
- Disability processing
- Death/survivor benefits
- Applicable Federal, State and Local laws, codes, ordinances, policies, procedures, rules and regulations
- Research methods
- Accounting principles, practices and methods
- Elementary statistics
- Data collection methods
- Retirement systems
- Analytical methods and techniques

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#### **Skills** (position requirements at entry):

Skill in:

- Using computers and applicable software applications
- Providing customer service
- Prepare and proofread clear, concise, and comprehensive reports, records, and other written documents
- Interpreting, applying, and explaining applicable laws, codes, ordinances, policies, procedures, rules and regulations
- Recognizing problems, identifying alternative solutions, and making appropriate recommendations
- Gathering, assembling, analyzing, and evaluating facts and evidence to draw logical conclusions and make appropriate recommendations
- Administering retirement programs
- Communication, interpersonal skills as applied to interaction with coworkers, supervisor, the general public, business/organizations, elected and appointed officials, etc. sufficient to exchange or convey information and give and/or receive work direction

#### **Physical Requirements:**

Positions in this class typically require: feeling, finger dexterity, grasping, hearing, and repetitive motions, seeing and talking.

**Sedentary Work:** Exerting up to 10 pounds of force occasionally and/or a negligible amount of force frequently or constantly to life, carry, push, pull or otherwise move objects including one's own body. Sedentary work involves sitting most of the time. Jobs are sedentary if walking and standing are required only occasionally and all other sedentary criteria are met. Some positions may require more frequent walking, lifting and standing.

#### **Note:**

The above job specification is intended to represent only the key areas of responsibilities; specific position assignments will vary depending on the business needs of the department.

#### **Classification History:**

Draft prepared by Fox Lawson & Associates (LM)

Date: 12/2007

Reviewed by the City of Fresno

Date: 5/2008